HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Alberta

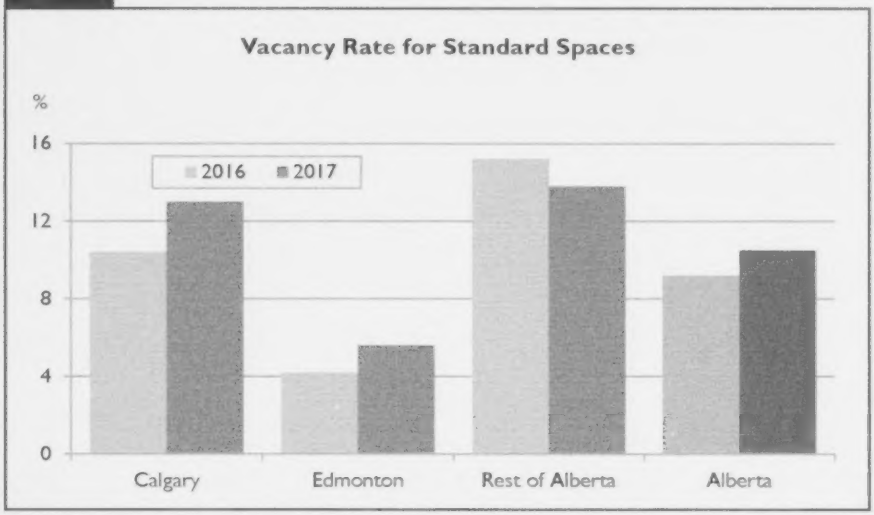
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2017

Highlights

- The overall vacancy rate for a standard space in retirement homes in Alberta increased from 9.2% in 2016, to 10.5% in 2017.
- Calgary exhibited the largest increase in vacancy, increasing 2.6 percentage points to 13% in 2017.
- Some of Alberta's increased vacancy rate was due to an increase in supply of units. There were 12,624 units included in the survey, as opposed to 12,211 in 2016.
- However, demand for these units increased by 1.8% as the number of Albertan residents increased from 12,261 to 12,477.
- Overall average rent in Alberta for a standard space increased to $3,015 per month in 2017 from $2,992 in 2016.

Figure 1



Source: CMHC

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Previous Seniors' Housing Reports were mainly descriptive. In an effort to produce a more meaningful report, the text in the report has been shortened to focus only on key highlights while continuing to give you the data tables you have always received. An optional spotlight section focusing on topics related to the Seniors' Housing Market is included in some reports.

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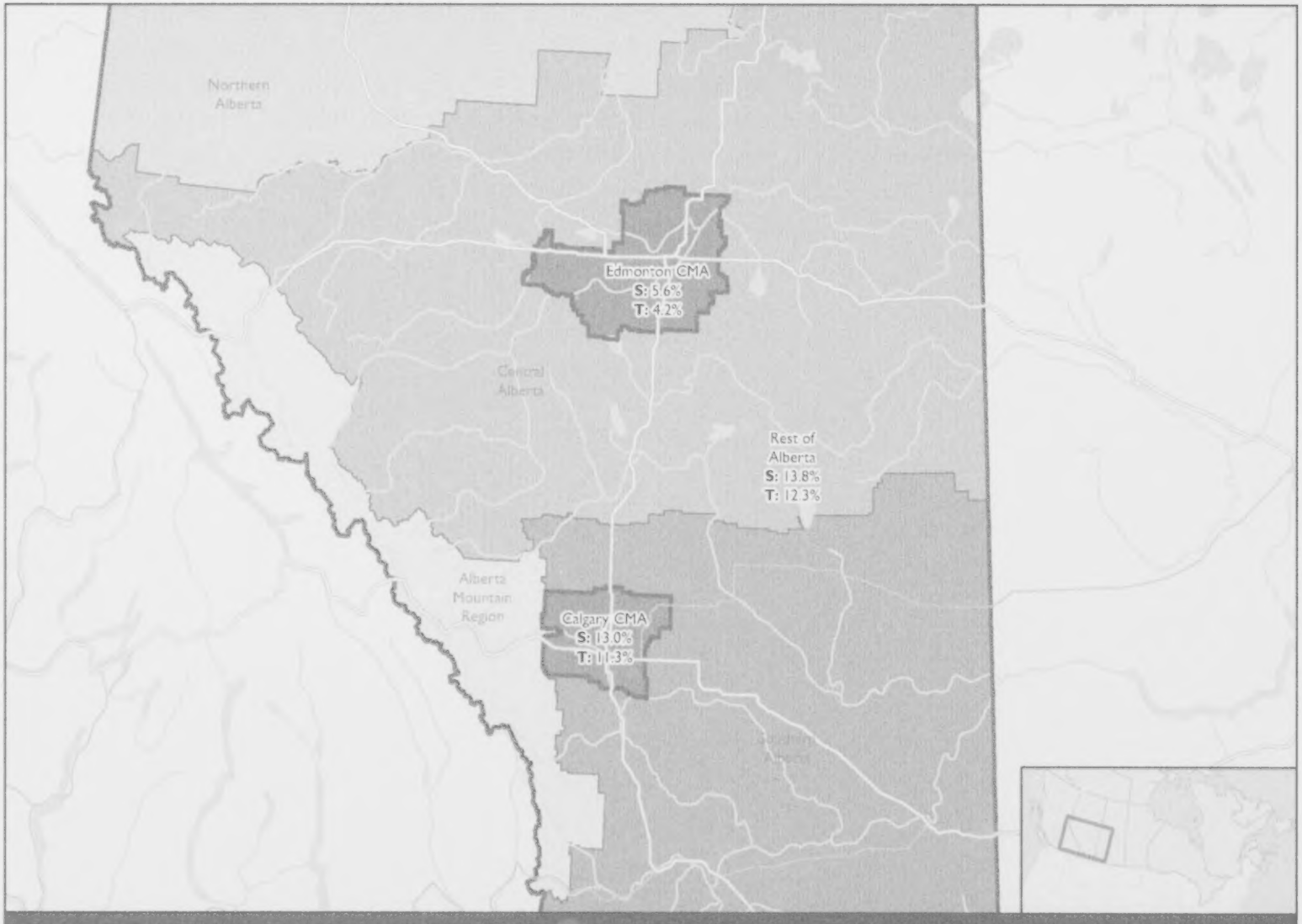

Alberta Vacancy Rate of Standard and Total (Universe) Spaces

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Alberta

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Calgary CMA	**	**	13.2	15.3	9.7	12.0	5.5	10.6	10.4	13.0
Edmonton CMA	**	**	8.6	6.6	3.6	5.6	1.4	4.7	4.2	5.6
Rest of Alberta	**	**	17.2	17.6	14.3	13.4	16.2	10.1	15.2	13.8
Alberta	**	**	**12.7**	**13.4**	**8.4**	**9.9**	**6.6**	**7.9**	**9.2**	**10.5**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates (%) of Standard Spaces by Rent Range ($)
Alberta

Centre	Less than $2,000		$2,000 - $2,499		$2,500 - $2,999		$3,000 - $3,499		$3,500 and More		Total Where Rents are Known	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Calgary CMA	20.0	20.0	13.7	11.6	10.5	9.2	6.2	14.4	9.8	13.7	10.2	13.0
Edmonton CMA	3.0	7.2	5.3	3.2	2.9	4.1	4.4	7.2	5.1	6.5	4.2	5.6
Rest of Alberta	19.5	17.0	13.2	11.3	15.0	12.9	9.1	10.0	17.5	14.5	15.2	13.8
Alberta	**10.9**	**12.6**	**10.0**	**8.2**	**9.4**	**8.3**	**6.0**	**10.7**	**9.1**	**11.9**	**9.1**	**10.5**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
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1.3 Vacancy Rates (%) and Average Rents ($) of Heavy Care Spaces[1]
Alberta

Centre	Vacancy Rate		Average Rent	
	2016	2017	2016	2017
Calgary CMA	6.3	4.7	**	6,245
Edmonton CMA	0.9	1.6	**	5,426
Rest of Alberta	10.9	9.5	**	3,982
Alberta	**5.7**	**5.1**	**5,478**	**5,456**

[1] Non-market heavy care units are excluded from Average Rents, but are included in Vacancy Rate.

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Alberta

Centre	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2016	2017				
Calgary CMA	4,131	9.6	11.3	32	4,013		
Edmonton CMA	4,895	3.1	4.2	38	5,060		
Rest of Alberta	3,598	12.9	12.3	48	3,405		
Alberta	**12,624**	**7.9**	**8.8**	**118**	**12,477**	**219,900**	**5.7**

[1] Source: Statistics Canada. Table 052-0005 - Projected population, by projection scenario , age and sex, as of July 1, Canada, provinces and territories, annual (persons),CANSIM

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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2.1 Universe of Total Spaces by Unit Type Alberta				
Centre	**Semi Private/ Bachelor**	**One Bedroom**	**Two Bedroom +**	**Total**
Calgary CMA	1,846	1,885	400	4,131
Edmonton CMA	1,319	2,871	705	4,895
Rest of Alberta	1,574	1,606	418	3,598
Alberta	**4,739**	**6,362**	**1,523**	**12,624**

2.2 Universe by Unit Type Alberta				
Centre	**Semi Private/ Bachelor**	**One Bedroom**	**Two Bedroom +**	**Total**
Calgary CMA	1,846	1,885	400	4,131
Standard Spaces	1,007	1,578	348	2,933
Non-Standard Spaces	616	121	7	744
Unknown Spaces	223	186	45	454
Edmonton CMA	1,319	2,871	705	4,895
Standard Spaces	486	1,591	464	2,541
Non-Standard Spaces	619	607	71	1,297
Unknown Spaces	214	673	170	1,057
Rest of Alberta	1,574	1,606	418	3,598
Standard Spaces	386	1,047	258	1,691
Non-Standard Spaces	796	169	8	973
Unknown Spaces	392	390	152	934
Alberta	**4,739**	**6,362**	**1,523**	**12,624**
Standard Spaces	1,879	4,216	1,070	7,165
Non-Standard Spaces	2,031	897	86	3,014
Unknown Spaces	829	1,249	367	2,445

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2.3 Universe of Standard Spaces by Rent Range ($)
Alberta

Centre	Less than $2,000	$2,000 - $2,499	$2,500 - $2,999	$3,000 - $3,499	$3,500 and More
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Calgary CMA	3.1	12.0	17.0	14.2	53.7
Edmonton CMA	23.6	19.5	20.1	13.7	23.0
Rest of Alberta	33.2	24.9	20.3	10.3	11.3
Alberta	**18.5**	**18.2**	**19.0**	**13.0**	**31.3**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Alberta

Centre	Meals				On-Site Medical Services	On-Site Nursing Services[2]	24-Hour Call Bell	Pharmacy
	Optional	# of Meals Included in Rent						
		1	2	3				
Calgary CMA	0.0	**	**	82.1	**	**	92.9	**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0	**	**	83.3	**	**	95.8	**
Edmonton CMA	**	**	**	**	**	**	93.3	**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	**	**	**	**	**	**	91.3	**
Rest of Alberta	2.1	**	**	**	**	**	88.9	4.2
10 - 49	**	**	**	**	**	**	**	7.9
50 - 89	4.6	**	**	**	**	**	95.4	4.6
90 or more	**	**	**	**	**	**	100.0	**
Alberta	**3.0**	**21.7**	**9.7**	**65.6**	**62.1**	**56.7**	**91.4**	**16.1**
10 - 49	0.0	**	**	**	**	**	**	5.7
50 - 89	3.3	**	**	**	**	**	96.7	**
90 or more	3.6	**	**	69.8	58.2	59.8	94.8	**

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] On-site nursing services include RN, RPN or LPN.

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2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Alberta

Centre	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Calgary CMA	89.3	**	**	**	92.9	85.7
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	95.8	**	**	**	100.0	95.8
Edmonton CMA	**	**	**	**	80.0	**
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	82.6	**
Rest of Alberta	**	4.2	**	**	78.1	**
10 - 49	**	**	**	**	**	**
50 - 89	**	4.6	**	**	90.9	**
90 or more	**	7.4	**	**	100.0	**
Alberta	**64.4**	**10.8**	**29.4**	**	**82.7**	**68.3**
10 - 49	**	0.0	0.0	**	**	**
50 - 89	**	3.3	**	**	85.5	**
90 or more	84.1	**	**	**	92.8	83.5

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Alberta

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Calgary CMA	**	**	2,767	2,873	3,839	3,868	4,716	4,680	3,583	3,623
Edmonton CMA	**	**	2,081	2,052	2,676	2,742	3,308	3,557	2,680	2,759
Rest of Alberta	**	**	2,024	2,028	2,569	2,495	3,287	3,243	2,581	2,517
Alberta	**	**	**2,417**	**2,460**	**3,042**	**3,051**	**3,709**	**3,793**	**2,992**	**3,015**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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01 Building Structure Makeup (%) Alberta		
Centre	**Concrete Frame**	**Wood Frame**
Calgary CMA	35.5	64.5
Edmonton CMA	55.3	44.7
Rest of Alberta	19.1	80.9
Total	**35.3**	**64.7**

02 Ancillary Services, Cable and Telephone and Optional Costs (% of residences) Alberta					
Centre	**Services**	**Included in Rent (%)**	**Tenant Arrange (%)**	**Optional (%)**	**Average Cost if Optional ($)**
Calgary CMA	Cable	50.0	31.3	18.8	39.20
	Telephone	21.9	59.4	15.6	**
Edmonton CMA	Cable	57.9	34.2	7.9	**
	Telephone	2.6	81.6	13.2	**
Rest of Alberta	Cable	45.8	27.1	25.0	32.50
	Telephone	16.7	56.3	20.8	**
Total	**Cable**	**50.8**	**30.5**	**17.8**	**36.56**
	Telephone	**13.6**	**65.3**	**16.9**	**43.60**

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O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Alberta

Centre	Before 1990	1990 - 1999	2000 or Later	Total
Calgary CMA	**	15.0	11.8	13.0
Edmonton CMA	5.9	**	6.0	5.6
Rest of Alberta	**	15.8	13.4	13.8
Alberta	**8.8**	**12.4**	**10.5**	**10.5**

O3.2 Vacancy Rates (%) of Total Spaces[1] by Unit Type
Alberta

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Calgary CMA	**	**	10.9	11.7	9.5	11.4	5.4	10.4	9.6	11.3
Edmonton CMA	**	**	4.9	3.4	2.7	4.4	1.3	4.3	3.1	4.2
Rest of Alberta	**	**	11.4	11.6	13.3	13.4	16.2	10.4	12.9	12.3
Alberta	**5.2**	**5.9**	**9.2**	**9.2**	**7.4**	**8.9**	**6.2**	**7.6**	**7.9**	**8.8**

[1]Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

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O3.3 Universe of Total Spaces[1] by Size of Residence Alberta

Centre	< 50 Spaces		50 - 99 Spaces		100 + Spaces		Median
	Number of Residences	Total Spaces	Number of Residences	Total Spaces	Number of Residences	Total Spaces	Residence Size
Calgary CMA	1	43	5	396	26	3,692	133
Edmonton CMA	3	68	9	728	26	4,099	118
Rest of Alberta	10	216	25	1,724	13	1,658	68
Alberta	**14**	**327**	**39**	**2,848**	**65**	**9,449**	**105**

[1]Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

O3.4 Vacancy Rate (%) and Universe of Total Spaces[1] by Date Residence Opened Alberta

Centre	Before 2001		2001 or Later		Total	
	Vacancy Rate	Universe	Vacancy Rate	Universe	Vacancy Rate	Universe
Calgary CMA	13.4	1,191	8.7	2,940	10.0	4,131
Edmonton CMA	3.5	1,976	3.1	2,919	3.3	4,895
Rest of Alberta	11.5	529	9.0	3,069	9.4	3,598
Alberta	**7.8**	**3,696**	**7.0**	**8,928**	**7.2**	**12,624**

[1]Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

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O4 Average Rents ($) of Standard Spaces by Date Residence Opened
Alberta

Centre		Before 1990	1990 - 1999	2000 or Later	Total
Calgary CMA	Semi-Private	**	**	**	**
	Bachelor	**	2,806	2,888	2,873
	One Bedroom	**	3,878	3,811	3,868
	Two Bedroom +	**	5,074	4,475	4,680
	Total	**	3,453	3,667	3,623
Edmonton CMA	Semi-Private	**	**	**	**
	Bachelor	1,866	**	2,178	2,052
	One Bedroom	1,852	**	3,163	2,742
	Two Bedroom +	**	**	3,748	3,557
	Total	1,868	**	3,179	2,759
Rest of Alberta	Semi-Private	**	**	**	**
	Bachelor	**	2,123	1,981	2,028
	One Bedroom	**	**	2,440	2,495
	Two Bedroom +	**	**	3,218	3,243
	Total	**	2,591	2,505	2,517
Total	**Semi-Private**	**	**	**	**
	Bachelor	**2,312**	**2,588**	**2,466**	**2,460**
	One Bedroom	**2,321**	**3,350**	**3,136**	**3,051**
	Two Bedroom +	**3,472**	**4,253**	**3,774**	**3,793**
	Total	**2,390**	**3,106**	**3,131**	**3,015**

O5 Number of Residents, Number of Residents Living Alone and Number of Residents in Heavy Care Units
Alberta

Centre	2016	2017
Calgary CMA		
Total number of residents	3,999	4,013
Number of residents living alone	3,277	3,316
Total number of couples	361	348
Number of residents in heavy care units	741	776
Edmonton CMA		
Total number of residents	5,129	5,060
Number of residents living alone	4,288	4,322
Total number of couples	420	369
Number of residents in heavy care units	1,135	1,187
Rest of Alberta		
Total number of residents	3,133	3,405
Number of residents living alone	2,667	2,908
Total number of couples	233	**
Number of residents in heavy care units	855	**
Alberta		
Total number of residents	12,261	12,477
Number of residents living alone	10,232	10,547
Total number of couples	1,015	965
Number of residents in heavy care units	2,731	2,894

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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized (in the Atlantic provinces, Quebec and Ontario);
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2015 to be included in the 2016 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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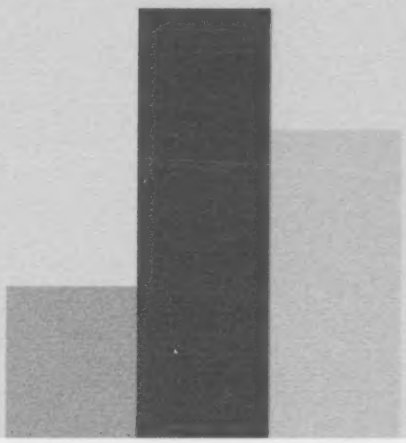

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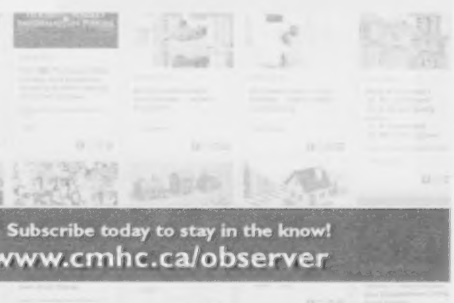

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